

Retention and Classification Report

Agency: Moab Charter School (Utah) (3443)

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Records Officer Emma Weiss

28212	Accounts Payable, Vendor, and Procurement Files
28215	Bank, Facility and Risk Management Records
28211	Board Governance and Financial Records
28216	Board Minutes & Policies
28213	Human resource and payroll related records
28214	Student Records

AGENCY: Moab Charter School (Utah)

SERIES: 28212

3

TITLE: Accounts Payable, Vendor, and Procurement Files

DATES: 2004-

ARRANGEMENT: Alphabetical by name

DESCRIPTION:

These records are used to pay school district bills. They include copies of checks, invoices, purchase orders, and receiving reports. May also include correspondence with vendors and computer printouts.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SD 5, Item 1.

AUTHORIZED: 02/25/2013

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

APPRAISAL:

Administrative Fiscal

PRIMARY CLASSIFICATION:

Public

AGENCY: Moab Charter School (Utah)

SERIES: 28215

3

TITLE: Bank, Facility and Risk Management Records

DATES: 2004-

ARRANGEMENT: Chronological then alphabetical

DESCRIPTION:

Reports of accounting information contained in the state accounting system, including budget, grant, payroll, revenue expense, accounting reports, and bank reconciliations.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 7, Item 55.

AUTHORIZED: 02/25/2013

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 5 years and then destroy.

APPRAISAL:

Administrative Fiscal Legal

PRIMARY CLASSIFICATION:

Public

AGENCY: Moab Charter School (Utah)

SERIES: 28211

3

TITLE: Board Governance and Financial Records

DATES: 2004-

ARRANGEMENT: Chronological then alphabetical

DESCRIPTION:

These are financial use by the school board in governing the financial affairs of the school. These records are used to monitor the financial compliance of the school in relation to board policies, state and federal laws, and the school's charter. The records include audited financial statements, tax returns, state and federal program reports, Annual Financial Reports, and Annual Program Reports.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SD 5, Item 4.

AUTHORIZED: 02/25/2013

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 5 years and then transfer to State Records Center. Retain in State Records Center permanently.

APPRAISAL:

Administrative Fiscal Historical

PRIMARY CLASSIFICATION:

Public

AGENCY: Moab Charter School (Utah)

SERIES: 28216

3

TITLE: Board Minutes & Policies

DATES: 2004-

ARRANGEMENT: Chronological then alphabetical

DESCRIPTION:

These are the minutes of regular, special, and emergency meetings of official district committees, boards, and task forces. They may also include an official agenda. See Internal committee records

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SD 1, Item 15.

AUTHORIZED: 02/25/2013

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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APPRAISAL:

Administrative Historical Legal

PRIMARY CLASSIFICATION:

Public

AGENCY: Moab Charter School (Utah)

SERIES: 28213

3

TITLE: Human resource and payroll related records

DATES: 2004-

ARRANGEMENT: Alphabetical by name thereunder chronological for payroll

DESCRIPTION:

These are the personnel files for all certified district employees. They are used to document employment. The files include the employment applications, authorizations for hire forms, placement records, employee history card, copies of school transcripts, pay and leave history, work performance, in-service training completion certificates and credits, evaluation records, teaching certificates, previous teaching experience, contracts, lane change requests, and related correspondence. May also include fingerprints and verification of the criminal background check.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule 94, Item 1.

AUTHORIZED: 02/25/2013

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 63 years and then destroy.

APPRAISAL:

Administrative Fiscal Legal

AGENCY: Moab Charter School (Utah)

SERIES: 28213

TITLE: Human resource and payroll related records

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Moab Charter School (Utah)

SERIES: 28214

3

TITLE: Student Records

DATES: 2004-

ARRANGEMENT: Alphabetical

DESCRIPTION:

These are student cumulative files for students whose records were not transferred but no longer attend this school. They were used to document the student's attendance. They include test scores, immunization record, eye testing, and all pertinent information on the student. These student files are commonly known as "dead files."

RETENTION:

Retain 3 years

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SD 17, Item 23.

AUTHORIZED: 02/25/2013

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 3 years after graduation and then destroy.

APPRAISAL:

Administrative Legal

AGENCY: Moab Charter School (Utah)

SERIES: 28214

TITLE: Student Records

(continued)

PRIMARY CLASSIFICATION:

Private